

Scope Management

Project Scope

Project scope is everything about a project – work content as well as expected outcomes.

Scope management is the function of controlling a project in terms of its goals and objectives and consists of:

1) Conceptual development	4) Scope reporting
2) Scope statement	5) Control systems
3) Work authorization	6) Project closeout

Conceptual Development

The **process** that addresses **project objectives** by finding the best ways to meet them.

Key steps in information development:

- Problem/need statement
- Information gathering
- Constraints
- Alternative analysis
- Project objectives

Problem Statements

Successful conceptual development requires:

- **Reduction** of overall project **complexity**
- Goals and objects are **clearly stated**
 - Reference points are provided
- Complete **understanding** of the problem

Statement of Work (SOW)

A SOW is a **detailed narrative description** of the work required for a project.

Effective SOWs contain

1. Introduction and background
2. Technical description
3. Timeline and milestones
4. Client expectations

The Scope Statement Process

1. Establish the project **goal criteria**
 - a) cost
 - b) schedule
 - c) performance
 - d) deliverables
 - e) review gates
2. Develop the **management plan** for the project
3. Establish a **work breakdown structure**
4. Create a **scope baseline**

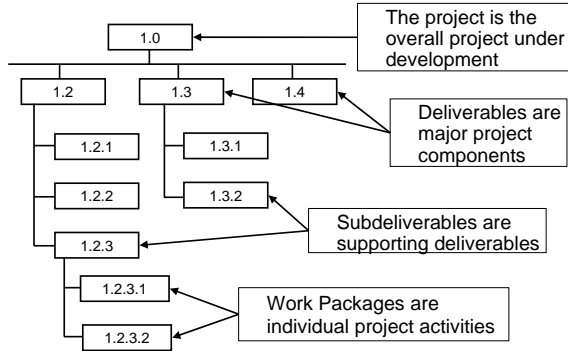
Work Breakdown Structure

a process that sets a project's scope by **breaking down** its overall **mission** into a cohesive set of synchronous, increasingly **specific tasks**.

What does WBS accomplish?

- ❖ Echoes project objectives
- ❖ Offers a logical structure
- ❖ Establishes a method of control
- ❖ Communicates project status
- ❖ Improved communication
- ❖ Demonstrates control structure

Work Breakdown Structure and Codes



Sample WBS in MS Project

Task Name	Nov 13, '05	Nov 20, '05	Nov 27, '05
1. IT Installation Project	S	M	T
1.1 Match IT to org. tasks	■	■	■
1.1.1 Conduct problem analysis	■	■	■
1.1.2 Identify info on IT technology	■	■	■
1.2 Identify it user needs	■	■	■
1.2.1 Interview potential users	■	■	■
1.2.2 Develop presentation of IT benefits	■	■	■
1.2.3 Gain user "buy in" to system	■	■	■
1.3 Prepare Information Proposal	■	■	■
1.3.1 Develop cost/benefit information	■	■	■
1.3.2 Gain top management support	■	■	■

Work Packages

Lowest level in WBS

Deliverable result

One owner

Miniature projects

Milestones

Fits organization

Trackable

Organizational Breakdown Structure

Organizational Breakdown Structure (OBS) allows

- Work definition
- Owner assignment of work packages
- Budget assignment to departments

OBS links cost, activity & responsibility

Responsibility Assignment Matrix

Deliverable	Task & Code	LEAD PROJECT PERSONNEL					
		Dave IS	Sue HR	Ann R&D	Jim R&D	Bob IS	IS
Match IT to Org. Tasks 1.1	Problem Analysis 1.1.1	<input type="checkbox"/>			☆	○	
	Develop info 1.1.2	○	<input type="checkbox"/>			☆	
Identify IS user needs 1.2	Interview users 1.2.1	○	○	☆		<input type="checkbox"/>	
	Develop show 1.2.2	☆			<input type="checkbox"/>	○	
	Gain user "buy in" 1.2.3		☆	<input type="checkbox"/>	○		
Prepare proposal 1.3	Find cost/benefit info 1.3.1			○		<input type="checkbox"/>	

Notification Responsible Approval ☆ Support

Work Authorization

The formal “**go ahead**” to begin work

Follows the scope management steps of:

1. scope definition
2. planning documents
3. management plans
4. contractual documents

Contractual Documentation

Most contracts contain:

- Requirements**
- Valid consideration**
- Contracted terms**

Contracts range from:

Lump Sum ←————→ Cost Plus
also called
“Turnkey”

Scope Reporting

*determines **what** types of information reported, **who** receives copies, **when**, and **how** information is acquired and disseminated.*

Typical project reports contain

1. Cost status
2. Schedule status
3. Technical performance

Types of Control Systems

- o Configuration
- o Design
- o Trend monitoring
- o Document
- o Acquisition
- o Specification

Project Closeout

The job is not over until the paperwork is done...

Closeout documentation is **used to:**

- Resolve disputes
- Train project managers
- Facilitate auditing

Closeout documentation **includes:**

- Historical records
- Post project analysis
- Financial closeout
